State of Indiana 2009 Open Enrollment Election Quick Step Guide

1.	Double-click on the **Internet Explorer** Icon on the desktop to open the Internet.
2.	When the Internet window opens, highlight the address field and enter the following web address: www.in.gov/spd/benefits
3.	Press the **Enter** key on the keyboard to access the State Personnel Benefits Division webpage.
4.	Click the **Login to PeopleSoft** `Login to PeopleSoft` rectangle located on the right side of the page (you may need to scroll down the page to locate the rectangle).
5.	Enter your user ID into the **User ID** field and your password into the **Password** field. For assistance with your user ID or password, please contact the IOT Helpdesk at 317-234-HELP (4357) or (800) 382-1095.
6.	Click the **Sign In** `Sign In` button.
7.	On the main page, locate the **Open Enrollment Elections** section, and click the **Enter Elections** `Enter Elections` button.
8.	Review your personal information. If you need to add or update: • your home or mailing address, click the yellow **Change home/mailing addresses** button; • your phone numbers, click the yellow **Change phone numbers** button; • your emergency contacts, click the yellow **Change emergency contacts** button; • your email addresses, click the yellow **Change email addresses** button Click the **Save** `Save` button and the **OK** `OK` button after each change. After all information has been updated, click the **Return to Personal Information** `Return to Personal Information` link to return to the **Personal Information** page. **Note:** If any changes to **marital status, employee information, or ethnic groups** are required, contact your agency human resources department.
9.	Click the **Proceed to Benefits Enrollment** `Proceed to Benefits Enrollment` button.
10.	Click the **Select** `Select` button to make your benefits elections.
11.	Click the **Edit** `Edit` button next to Medical.
12.	Click the **Option** button next to the plan name in which you wish to enroll. Select a provider for you and your dependents if eligible to enroll in the Wellborn HMO (Southern Indiana). If you do not wish to enroll in a plan, select the **Waive** option.
13.	Review the dependents listed toward the bottom of the page. Previously enrolled dependents will appear in the list. You know your dependent is enrolled in the plan when the Enroll check box is marked. To add or make changes to dependents, click the **Add/Review Dependents** `Add/Review Dependents` button. To add a dependent, click the **Add a dependent or beneficiary** `Add a dependent or beneficiary` link. To make changes to a dependent, click on their name and then click the **Edit** `Edit` button. After all changes are completed, click the **Save** `Save` button, click the **Return to Enrollment Dependent/Beneficiary Summary** `Return to Enrollment Dependent/Beneficiary Summary` link, and click the **Return to Event Selection** `Return to Event Selection` link. When updating over-age dependents, be sure to check the student checkbox and enter the appropriate As-of date. Not entering a Date of Birth for any dependent may make them ineligible for coverage. If a dependent relationship has changed, contact the Benefits Hotline to make the change; **DO NOT** add duplicate information to correct/change relationship or status.
14.	When finished, click the **Continue** `Continue` button to review your election information. Click the **OK** `OK` button to return to the plan summary page. If changes are needed, click the Edit `Edit` button. (Employees selecting an HDHP will have to verify eligibility for a Health Savings Account (HSA) by reviewing the requirements and selecting the **Yes** or **No** button).

15.	If you selected a High Deductible Health Plan (HDHP), click the **www.HSA.Towerbank.net** www.HSA.Towerbank.net link to complete the Towerbank application. The employer code is 100366. You will need the social security numbers and birthdates of all beneficiaries and authorized signers. When finished, click the **red X** ✖ button in the Towerbank window to return to continue entering elections in PeopleSoft.
16.	Repeat steps 11 – 14 to select Dental and Vision plans.
17.	Click the **Edit** Edit button next to Medical Spending Account. Read the Election Warning message and then click the **OK** OK button to continue. Click the correct **Option** ◉ button. If you did **NOT** elect an HSA, select the **Medical Care FSA** option. If you **DID** elect an HSA, select the **Limited Purpose Medical FSA** option. If you do not wish to enroll, select the **Waive** option.
18.	Enter the amount you wish to contribute into the **Annual Pledge** field. If you need help figuring out how much to contribute, PeopleSoft can help with contribution calculations by clicking the **Worksheet** Worksheet link.
19.	When finished, click the **Continue** Continue button to review your election information. Click the **OK** OK button to return to the plan summary page.
20.	Click the **Edit** Edit button next to Dependent Care Spending Account. Click the correct **Option** ◉ button.
21.	Repeat steps 18 – 19 if enrolling in the Dependent Spending Account
22.	Click the **Edit** Edit button next to Basic Life. Select the **Option** ◉ button to enroll.
23.	Scroll to the bottom of the page to review your beneficiary information. Click the **Add/Review Beneficiaries** Add/Review Beneficiaries button to make any changes.
24.	Review the Primary and Secondary beneficiary allocations. Edit the allocation as desired confirming all allocations equal 100%.
25.	When finished, click the **Continue** Continue button to review your election information. Click the **OK** OK button to return to the plan summary page.
26.	Repeat steps 16 – 19 to enroll in Supplemental Life.
27.	Click the **Edit** Edit button next to Dependent Life. Click the checkboxes ☐ next to each dependent's name to enroll them in the plan.
28.	When finished, click the **Continue** Continue button to review your election information. Click the **OK** OK button to return to the plan summary page.
29.	To submit your elections, click the **Submit** Submit button. **Important: Your enrollment will not be complete until you click the yellow Submit button.**
30.	Click the **I Agree** option to accept or **I Disagree** option to decline for the **Non Tobacco Use Agreement**.
31.	Click the Payroll Deduction Authorization checkbox ☐ to authorize your deductions.
32.	Click the **Submit** Submit button.
33.	You will receive a message that your benefits were successfully submitted. Click the **OK** OK button.
34.	Click the **Election Summary** Election Summary button. A pop-up window will open showing a summary of your elections.
35.	To print your **Election Summary**, right-click the mouse button (left-handed mouse users would left-click the mouse button) and select **Print** from the list of values provided on the Microsoft pop-up menu.
36.	Click the **Print** Print button to print the **Election Summary** for your files. When finished, click the **red X** ✖ button in the Election Summary pop-up window and return to the main **Benefits Enrollment** page.
37.	Providing quality customer service is the State Personnel Department's main priority. To assist State Personnel in improving the benefits enrollment process, click the Open Enrollment Survey Open Enrollment Survey link at the bottom of the main **Benefits Enrollment** page to complete the survey.
38.	Click the **Sign out** Sign out link in the upper-right-hand corner to close your PeopleSoft session.
39.	**End of Procedure.**

Please contact the Benefits Hotline with any additional questions or concerns. Employees outside of the Indianapolis area can call toll free to 1-877-248-0007. Employees within the Indianapolis area can call 317-232-1167.